



Step-by-Step to Building a Purposeful Board Member Orientation Binder

1. Identify the purpose and scope of the binder. Is it to walk the new board member through the step-by-step process of board procedures? Is it to introduce them to the school's mission and purpose, history and policies, rules of appropriate behavior, roles and responsibilities, and procedures pursuant to attendance? Or is it a combination of both?
2. Outline the list of topics and resources to be provided in the binder and determine whether the board wants to write the entire manual or delegate sections of it to knowledgeable members and school leaders. This decision will be based on the complexity of the task as well as the format of the binder and how often the binder will need to be updated to keep pace with organizational growth and the introduction of new technology.
3. Collect existing documents for inclusion in the manual (hard copy or electronic). These will include such items as the hiring policy and process, parliamentary procedures, board member job description, organization's mission statement, latest annual report, an organizational chart, and perhaps a copy of the latest school newsletter. Below is a recommended list, but not end all, of items that might be included in the board's binder.

Board Member Binders: A Copy Of...
Critical Documents: School's current standing (Academics, Finances, Compliance, Charter Terms) Historical One Pager or Marketing Brochure Outcomes Board Calendar Schedule Strategic Goals Current Budget Board member job descriptions Board Bylaws Parliamentary Procedures Cheat Sheet School's Hiring Process Board member contact information, & committee assignments Strategic Plan Overview One page Summary of School's Financial Audits (Last 5 years) Summary of Previous Academic Results and Student Enrollment (Last 5 years) Overview of NC Teacher Working Conditions Survey Committees Descriptions, Goals and Responsibilities Fundraising Projects and Goals Upcoming Board Agenda

Laws:

Charter School Law

Open Meeting Law

Key School Policies:

Policy manual (Staff/Students)

Public Records Policy

Conflict of Interest Policy

Nepotism Policy

Grievance Policy and Procedures

Board member expectation policy

Board Member Recruiting Policies

Hiring Policy

Internal Control Policy

Historical Documents:

Charter Application

Charter Agreement

Previous Board Minutes

4. Through annual board evaluations (identifying organization needs) the board should develop a professional development calendar. The last 15 to 30 minutes of each meeting should be focused on board development. The catalyst for such professional development plan could be the annual retreat. We have an online and on-demand program that will carry your board through the year! [Learn more here.](#)

A list of potential professional development topics are listed below.

- a. Roles and responsibilities
 - b. Charter School Law
 - c. Non-profit Strategic planning
 - d. Fiscal planning and management
 - e. Developing effective policies
 - f. Parliamentary Procedures
 - g. Analyzing and Evaluating reports
 - h. Marketing
 - i. Media relations
5. Within the member binder include a sign-off sheet for the board member that includes the job description and expectations of a board member as an annual contract. This will acknowledge that she has received the orientation manual and that they will be responsible for reviewing all of the materials within.
 6. Adopt the policy regarding the development and maintenance of the board member binder.

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